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FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Barbara Lee
Status: Member
State/District: CA13

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2018
Filing Date: 05/14/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
AIG Polaris Choice IV Variable Annuity (formerly SunAmerica) ⇒ SA American Funds VCP Managed Allocation [OT] DESCRIPTION: Variable Annuity		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
AIG Polaris Choice IV Variable Annuity (formerly SunAmerica) ⇒ SA PIMCO VCP Tactical Balanced Portfolio [OT] DESCRIPTION: Variable Annuity		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
AIG Polaris Choice IV Variable Annuity (formerly SunAmerica) ⇒ SA T. Rowe Price VCP Balanced [OT] DESCRIPTION: Variable Annuity		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
Book contract with Rowman & Littlefield Publishers, Inc. (Approved by Committee) [OT] DESCRIPTION: Book contract		Undetermined	None	<input type="checkbox"/>
Charles Schwab Checking and Money Market Accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200 <input type="checkbox"/>
East West Bank Accounts, Oakland, CA [BA]		\$1,001 - \$15,000	Interest	\$1 - <input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
				\$200
Healthcare Trust of America, Inc. Class A (HTA) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200 <input type="checkbox"/>
Met Life Variable Annuity Fund ⇒ American Funds Growth Portfolio [OT]		None	None	<input type="checkbox"/>
DESCRIPTION: Variable Annuity--Fund Closed in 2019 and remaining funds deposited into East West Bank account				
Met Life Variable Annuity Fund ⇒ Clearbridge Aggressive Growth Portfolio [OT]		None	None	<input type="checkbox"/>
DESCRIPTION: Variable Annuity--Fund Closed in 2019 and remaining funds deposited into East West Bank account				
Met Life Variable Annuity Fund ⇒ Goldman Sachs Mid Cap Value Portfolio [OT]		None	None	<input type="checkbox"/>
DESCRIPTION: Variable Annuity--Fund Closed in 2019 and remaining funds deposited into East West Bank account				
Met Life Variable Annuity Fund ⇒ Invesco Small Cap Growth Portfolio [OT]		None	None	<input type="checkbox"/>
DESCRIPTION: Variable Annuity--Fund Closed in 2019 and remaining funds deposited into East West Bank account				
Met Life Variable Annuity Fund ⇒ Met Life Annuity Fund General Account [OT]		None	None	<input type="checkbox"/>
DESCRIPTION: Variable Annuity--Fund Closed in 2019 and remaining funds deposited into East West Bank account				
Met Life Variable Annuity Fund ⇒ Met Life Asset Allocation 100 Portfolio [OT]		None	None	<input type="checkbox"/>
DESCRIPTION: Variable Annuity--Fund Closed in 2019 and remaining funds deposited into East West Bank account				
Wells Fargo Bank Checking Account [BA]		\$1 - \$1,000	None	<input type="checkbox"/>
Wright-Patman Congressional Credit Union Checking and Savings Accounts [BA]		\$1,001 - \$15,000	None	<input type="checkbox"/>

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Credit Union Mortgage Association	January 2011	Mortgage on DC Condo Residence	\$250,001 - \$500,000
	Wells Fargo Bank	July 2012	Mortgage on Palm Desert, CA Condo Residence	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member, Congressional Advisory Council	The Faith and Politics Institute (Nonprofit Public Benefit Corporation)
Board Member	WILL/WAND (Nonprofit Public Benefit Corporation)
Board Member	Project Vote Smart (Nonprofit Public Benefit Corporation)
Trustee	Ghana Children's Fund (a project of the East Bay Community Foundation)
Board Member	ProgressiveCaucus.org (Nonprofit Public Benefit Corporation)
Member, Honorary Board of Advisors	National Student Leadership Conference (Nonprofit Public Benefit Corporation)
Member, Congressional Advisory Board	The Humpty Dumpty Institute (Nonprofit Public Benefit Corporation)
Member, Advisory Council	Dellums Institute (Nonprofit Public Benefit Corporation)
Member, Advisory Board	Grand Lakes Gardens Senior Living Community
Member, Advisory Board	Swords to Plowshares (Nonprofit Public Benefit Corporation)
Member, Congressional Council	Women's Information Network (WIN)(Nonprofit Public Benefit Corporation)
Trustee	American Baptist Seminary of the West
Board Member	Stiles Hall (Nonprofit Public Benefit Corporation)

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Center for Democracy in the Americas (CDA)	01/24/2018	01/28/2018	Washington DC - Havana, Cuba - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Progressive Caucus Center	03/8/2018	03/10/2018	Washington DC - Baltimore, MD - Washington DC	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
United Nations Foundation	04/23/2018	04/24/2018	Washington DC - New York City, NY - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Congressional Black Caucus Institute	11/9/2018	11/11/2018	Oakland, CA - Seattle, WA - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Global Poverty Project, Inc. d.b.a. Global Citizen	11/30/2018	12/4/2018	Washington DC - Johannesburg, South Africa - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
COMMENTS: Full source name: Global Poverty Project d.b.a. Global Citizen and the Global Fund to Fight AIDS, Tuberculosis, and Malaria							

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- AIG Polaris Choice IV Variable Annuity (formerly SunAmerica)
- Met Life Variable Annuity Fund

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Barbara Lee , 05/14/2019